

VerifiaBill

Chandu Majeti



Scroll down

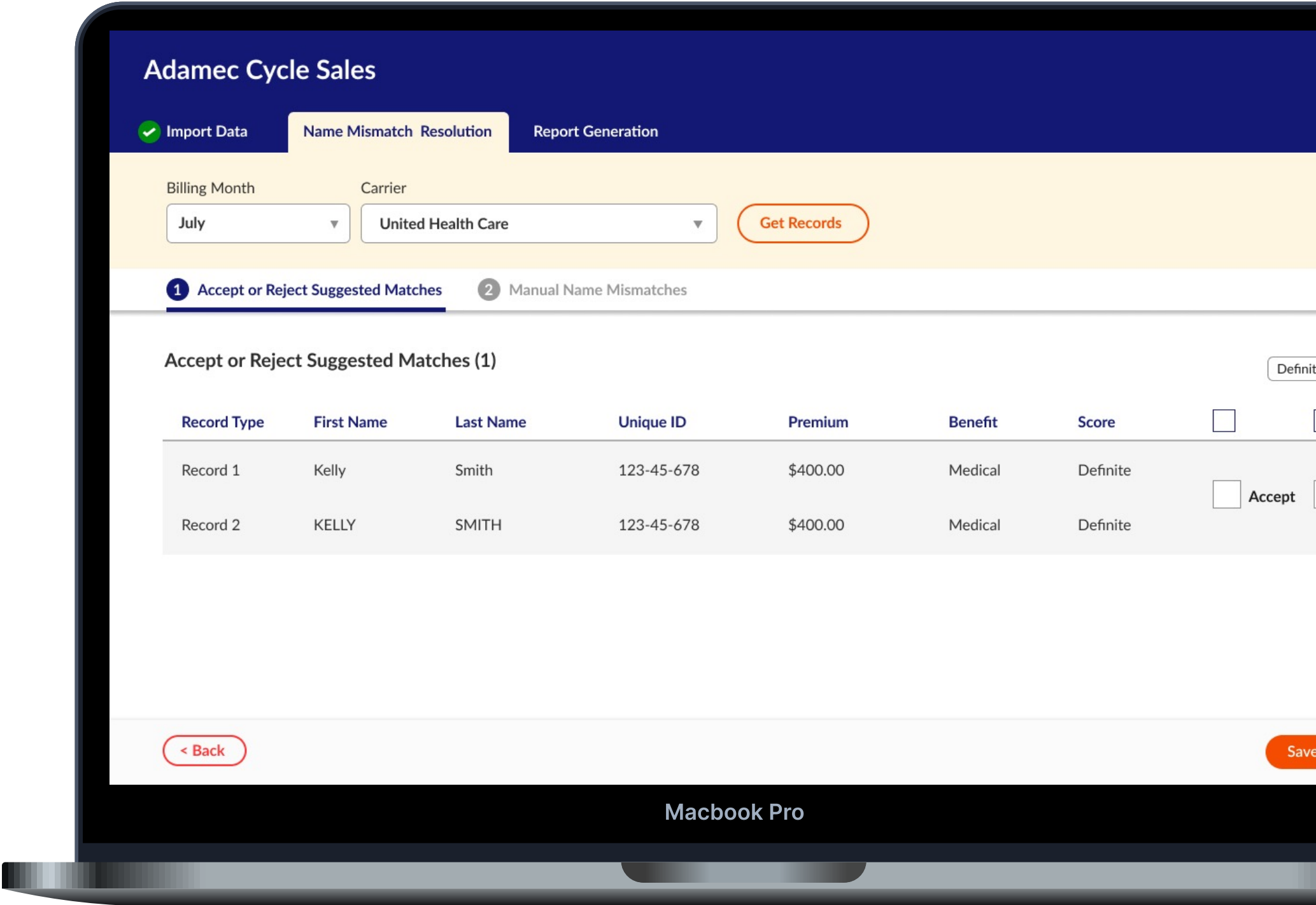
Project Overview

Product

Beneration’s VerifiaBill software offers everything you need to simplify the complex accounting processes of employee benefits billing.

Project duration

Worked 2 years in this project.
June 2022- March 2024



Project Overview



Problem

Existing screen (Resolve name mismatch screen) has multiple UX and UI issues & it took a lot of time for BPO team to finish the task.



Goal

Help users who are BPO team members to finish their task easily and quickly.(Reduce time)

Project Overview



My Role

UX Architect

Responsibilities

- I was the UX lead and conducted user interviews with actual users to understand the pain points, needs.
- Created personas.
- Expert review on existing screens.
- Created wireframes/concept sketches.
- Created visual designs & design guidelines.

Don't jump into design first.

Understanding the user

User research

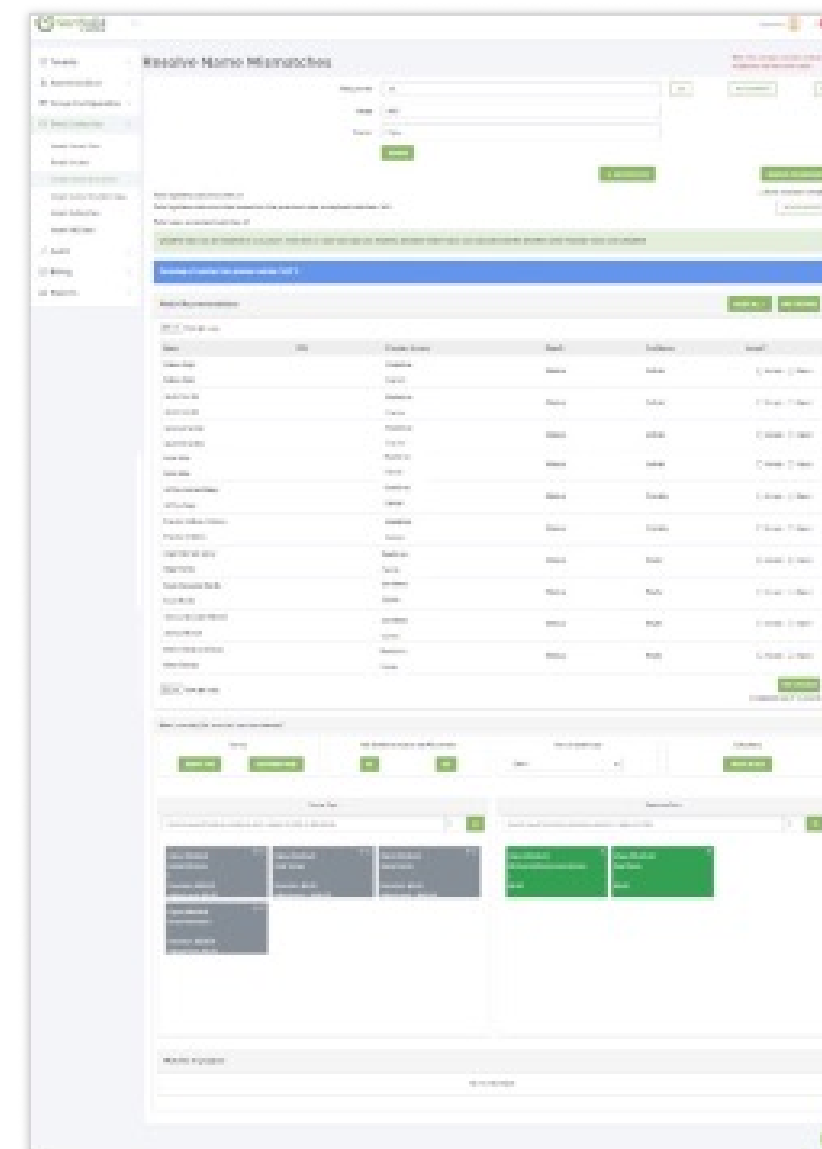
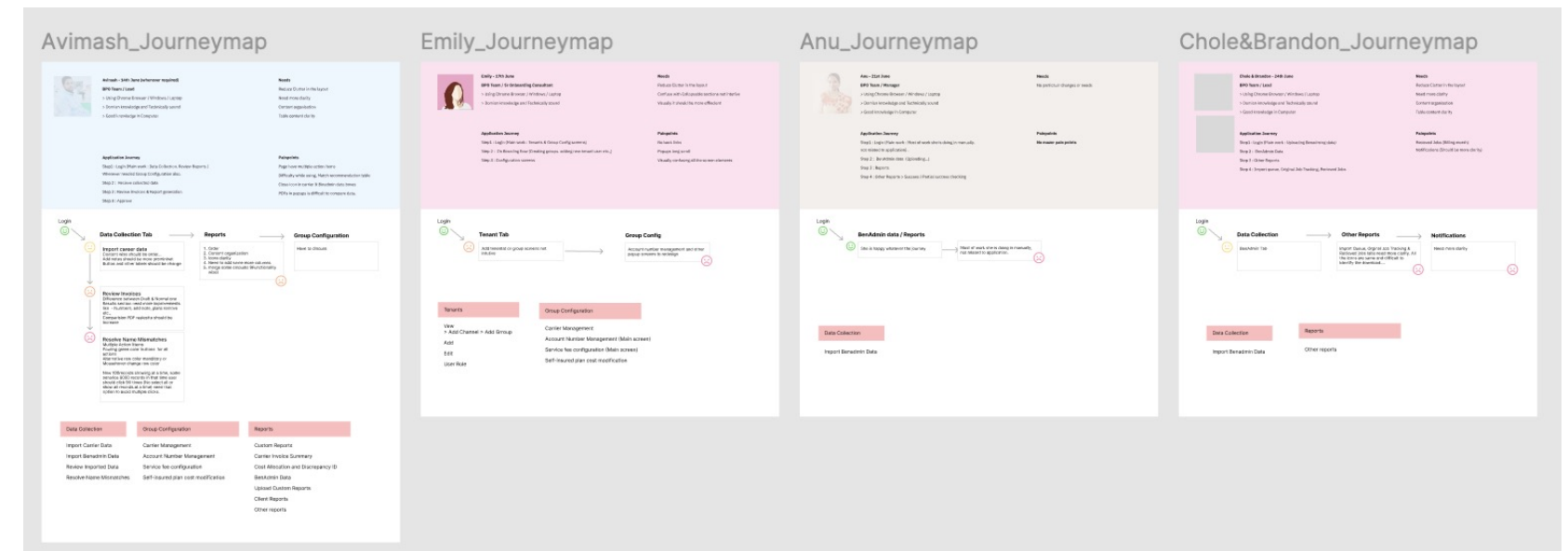
Personas

Journey map

User research

Interviews

- Interview with real users to understand needs and pain points in the screen.
- Due to existing project asked the BPO team to walk thru of the application flow.
- Asked the client to provide staging URL & required screenshots.

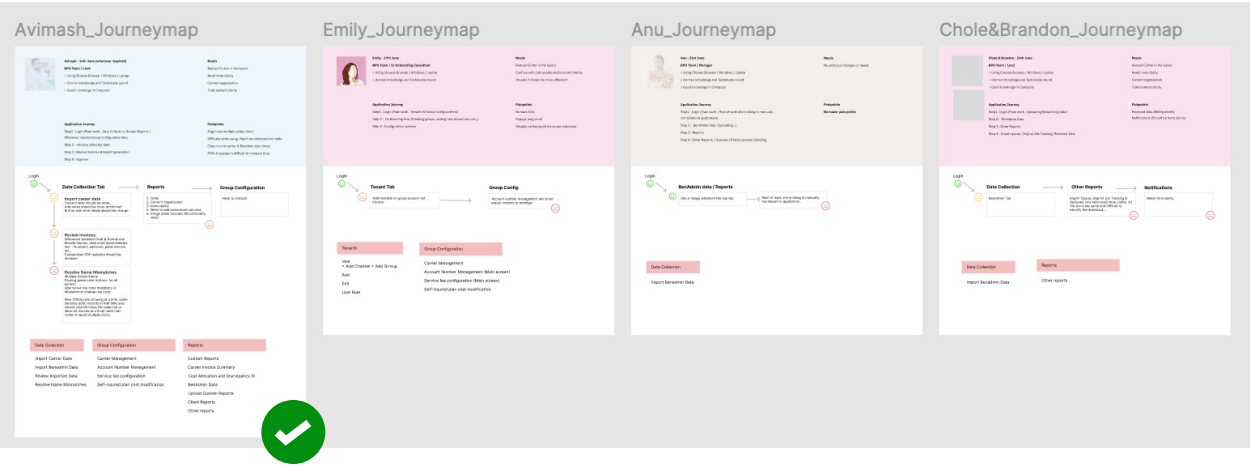


User research

Persona

Problem statment

Avi, as a BPO team lead, needs his team to work faster on the resolve name mismatch screen in the app because he has daily targets to meet.



Name : Avinash

Education : Graduated

Occupation : Team lead for BPO team

Brief : His daily job involves collecting data, reviewing it, and approving it. He primarily focuses on the approval process, guiding the team, and training new members.

Domain & Computer knowledge : Good

Frustrations :

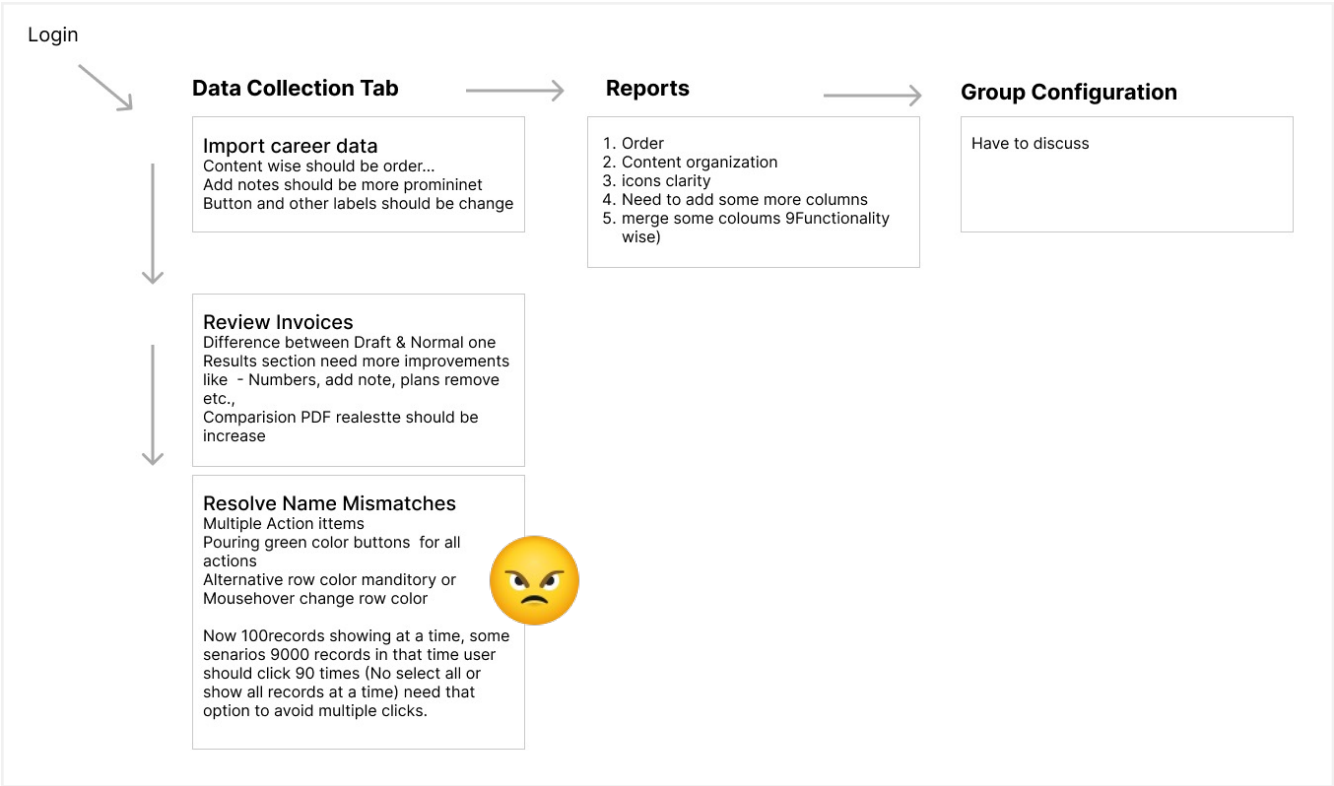
- Page have multiple action items
- Difficulty while using, Match recommendation table
- Close icon in carrier & BenAdmin data boxes
- Time consuming and not clear UI
- Difficult to train new users

User research

Understand Journey

Journey of Avi

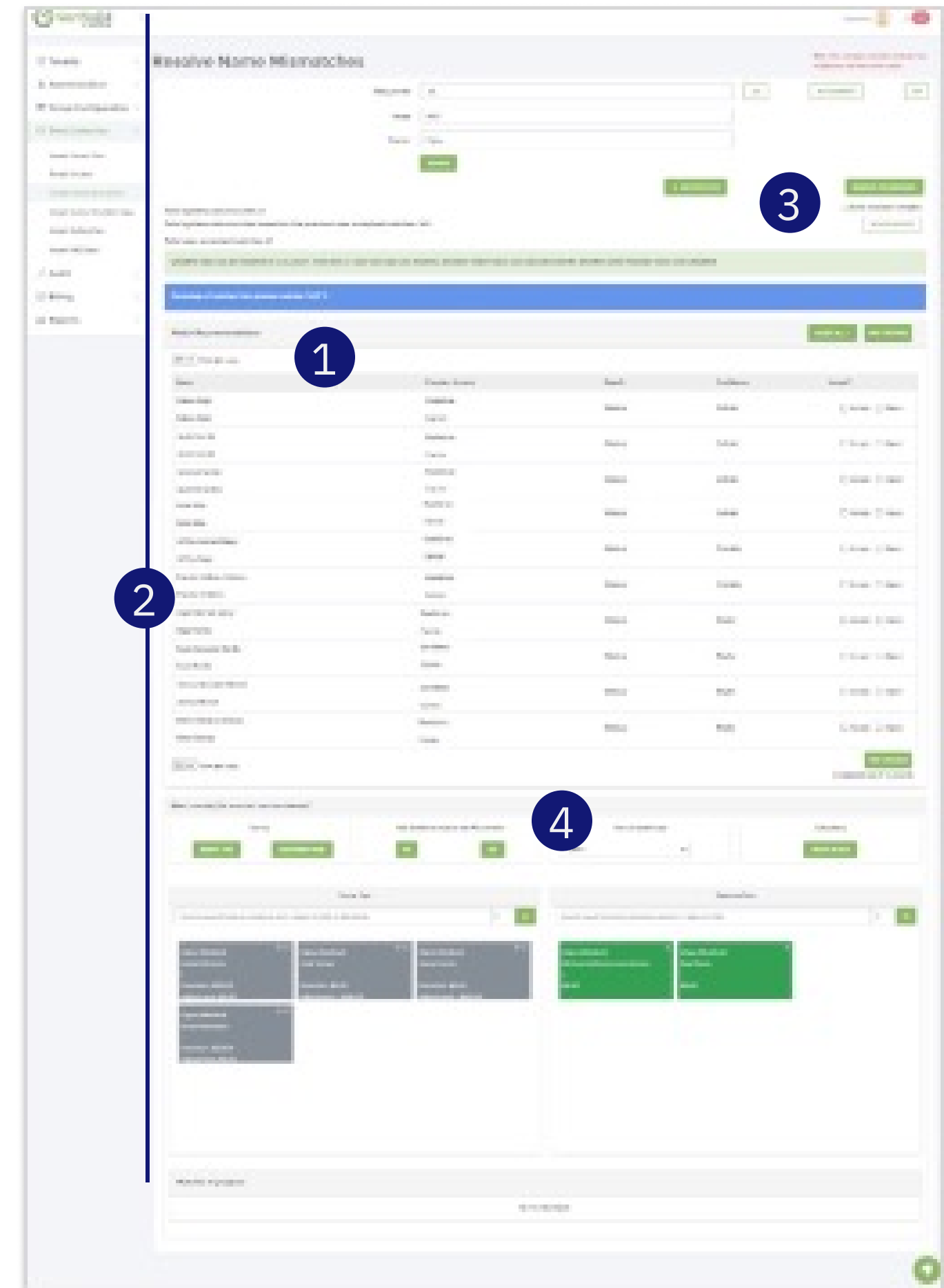
After logging in, Avi enters the dashboard, where he needs to complete a three-step process: importing data, resolving name mismatches 😡, and generating reports.



Search
Potential matches
Manual matches
Review & Generate

User research Expert Review

- 1 Difficulty to see match recommendations table.
- 2 Lengthy page, No proper steps overall UI clutter.
- 3 Multiple actions items and pouring green color.
- 4 Clutter on filter section areas.



Design

Digital wire frames

Design solutions

Visual designs

Testing with users

Design iterations

Design - Paper sketches

After understanding the mismatches page, roughly created my thoughts.

Input Data | Name Mismatch Resolution | Report Generation

Billing Month ✓ Carrier ✓

① Accept or Reject ② Manual Name Mismatch

Title 0-0-0

Title	Carrier	Match	Action
0	0	0	☒ Accept ☒ Reject
0	0	0	☐ Accept ☐ Reject
0	0	0	☐ Accept ☐ Reject
0	0	0	☐ Accept ☐ Reject
0	0	0	☐ Accept ☐ Reject
0	0	0	☐ Accept ☐ Reject
0	0	0	☐ Accept ☐ Reject
0	0	0	☐ Accept ☐ Reject

15 ✓

Navigation: < Back, Continue >

① Accept or Reject ② Manual Name Mismatch

Title

Name	Match
0 ①	☒
0 ②	☒
0 ③	☒
0 ④	☒
5/20	Wadner

< Back Resolve selected match

Matches - 4 | Review

Success
Report >
for one match

Design - Visual Design 1

Step 1: Search

Step 2: Potential matches

- 1 After the user interviews and walkthrough, I gained clarity on this page.
- 2 Divided the tasks into 4 clear steps. Search, Potential Matches, Manual Matches, Review&Generate.
- 3 Navigation and Potential data table differentiated clearly.

Adamec Cycle Sales

Import Data

Name Mismatch Resolution

Report Generation

Billing Month

Carrier

Get Records

1 Accept or Reject Suggested Matches

2 Manual Name Mismatches

Accept or Reject Suggested Matches (30)

BenAdmin

CarrierPremium

Definite

Record Type	First Name	Last Name	Unique ID	Premium	Benefit	Score		
Record type 1	Kelly	Smith	123-45-678	\$400.00	Medical	Definite	☒	☐
Record type 2	Kelley	Smith	123-45-678	\$400.00	Medical		☒	☐
Record type 3	Kelly	Smith	123-45-678	\$400.00	Medical	Definite	☒	☐
Record type 4	Kelley	Smith	123-45-678	\$400.00	Medical		☒	☐
Record type 5	Kelly	Smith	123-45-678	\$400.00	Medical	Definite	☒	☐
Record type 6	Kelley	Smith	123-45-678	\$400.00	Medical		☒	☐
Record type 7	Kelly	Smith	123-45-678	\$400.00	Medical	Definite	☒	☐
Record type 8	Kelley	Smith	123-45-678	\$400.00	Medical		☒	☐
Record type 9	Kelly	Smith	123-45-678	\$400.00	Medical	Definite	☒	☐
Record type 10	Kelley	Smith	123-45-678	\$400.00	Medical		☒	☐
Record type 11	Kelly	Smith	123-45-678	\$400.00	Medical	Definite	☒	☐
Record type 12	Kelley	Smith	123-45-678	\$400.00	Medical		☒	☐
Record type 13	Kelly	Smith	123-45-678	\$400.00	Medical	Definite	☒	☐
Record type 14	Kelley	Smith	123-45-678	\$400.00	Medical		☒	☐
Record type 15	Kelly	Smith	123-45-678	\$400.00	Medical	Definite	☒	☐
Record type 16	Kelley	Smith	123-45-678	\$400.00	Medical		☒	☐

Records per page

10

< Previous

1

2

3

Next >

< Back

Save Matches >

more details provided in next slide

Adamec Cycle Sales

✓ Import Data

Name Mismatch Resolution

Report Generation

Billing Month

Carrier

July

United Health Care

Get Records

1 Accept or Reject Suggested Matches

2 Manual Name Mismatches

Accept or Reject Suggested Matches (30)

B BenAdmin C CarrierPremium

Definite

Record Type	First Name	Last Name	Unique ID	Premium	Benefit	Score		
B Record type 1	Kelly	Smith	123-45-678	\$400.00	Medical	Definite	☒	☐
C Record type 2	Kelley	Smith	123-45-678	\$400.00	Medical		☐	☐
B Record type 3	Kelly	Smith	123-45-678	\$400.00	Medical	Definite	☒	☐
C Record type 4	Kelly	Smith	123-45-678	\$400.00	Medical		☐	☐
B Record type 5	Kelly	Smith	123-45-678	\$400.00	Medical	Definite	☒	☐
C Record type 6	Kelley	Smith	123-45-678	\$400.00	Medical		☐	☐
B Record type 7	Kelly	Smith	123-45-678	\$400.00	Medical	Definite	☒	☐
C Record type 8	Kelly	Smith	123-45-678	\$400.00	Medical		☐	☐
B Record type 9	Kelly	Smith	123-45-678	\$400.00	Medical	Definite	☒	☐
C Record type 10	Kelley	Smith	123-45-678	\$400.00	Medical		☐	☐
B Record type 11	Kelly	Smith	123-45-678	\$400.00	Medical	Definite	☒	☐
C Record type 12	Kelly	Smith	123-45-678	\$400.00	Medical		☐	☐
B Record type 13	Kelly	Smith	123-45-678	\$400.00	Medical	Definite	☒	☐
C Record type 14	Kelley	Smith	123-45-678	\$400.00	Medical		☐	☐
B Record type 15	Kelly	Smith	123-45-678	\$400.00	Medical	Definite	☒	☐
C Record type 16	Kelly	Smith	123-45-678	\$400.00	Medical		☐	☐

Records per page 10

< Previous 1 2 3 Next >

< Back

Save Matches >

Design - Visual Design 2

Step 3: Manual matches

Designed 3 versions.

1. Drop-down
2. Pagination
3. Load more

more details provided in next slide

Adamec Cycle Sales

Import Data

Name Mismatch Resolution

Report Generation

Billing Month

Carrier

Get Records

Manual Name Mismatches

Carrier Records (40)

Sort By

Life

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

5/40

5 Records

All

5 Records

10 Records

20 Records

BenAdmin Records (40)

Sort By

Life

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

5/40

5 Records

All

5 Records

10 Records

20 Records

< Back

Review Selected Matches

Adamec Cycle Sales

Import Data

Name Mismatch Resolution

Report Generation

Billing Month

Carrier

Get Records

Manual Name Mismatches

Carrier Records (40)

Sort By

Life

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

5

< Previous

1

2

3

4

5

Next >

BenAdmin Records (40)

Sort By

Life

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

5

< Previous

1

2

3

4

5

Next >

< Back

Review Selected Matches

Adamec Cycle Sales

Import Data

Name Mismatch Resolution

Report Generation

Billing Month

Carrier

Get Records

Manual Name Mismatches

Carrier Records (40)

Sort By

Life

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

Load more...

5/40

BenAdmin Records (40)

Sort By

Life

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

Load more...

5/40

< Back

Review Selected Matches

Step 3: Manual matches

Manual Name Mismatches

Carrier Records (40)

Sort By

Life

Q			
+	North American Benefits Company Melisa Vazquesz Premium : \$2.88	Long Term Disability 1234-45-678 Adjustment : \$0	☐
+	North American Benefits Company Melisa Vazquesz Premium : \$2.88	Long Term Disability 1234-45-678 Adjustment : \$0	☐
+	North American Benefits Company Melisa Vazquesz Premium : \$2.88	Long Term Disability 1234-45-678 Adjustment : \$0	☐
+	North American Benefits Company Melisa Vazquesz Premium : \$2.88	Long Term Disability 1234-45-678 Adjustment : \$0	☐
+	North American Benefits Company Melisa Vazquesz Premium : \$2.88	Long Term Disability 1234-45-678 Adjustment : \$0	☐
+	North American Benefits Company Melisa Vazquesz Premium : \$2.88	Long Term Disability 1234-45-678 Adjustment : \$0	☐
+	North American Benefits Company Melisa Vazquesz Premium : \$2.88	Long Term Disability 1234-45-678 Adjustment : \$0	☐
+	North American Benefits Company Melisa Vazquesz Premium : \$2.88	Long Term Disability 1234-45-678 Adjustment : \$0	☐
+	North American Benefits Company Melisa Vazquesz Premium : \$2.88	Long Term Disability 1234-45-678 Adjustment : \$0	☐

[Load more...](#)

10 / 40

BenAdmin Records (40)

Sort By

Life

Q			
☐	North American Benefits Company Melisa Vazquesz Premium : \$2.88	Long Term Disability 1234-45-678 Adjustment : \$0	
☐	North American Benefits Company Melisa Vazquesz Premium : \$2.88	Long Term Disability 1234-45-678 Adjustment : \$0	
☐	North American Benefits Company Melisa Vazquesz Premium : \$2.88	Long Term Disability 1234-45-678 Adjustment : \$0	
☐	North American Benefits Company Melisa Vazquesz Premium : \$2.88	Long Term Disability 1234-45-678 Adjustment : \$0	
☐	North American Benefits Company Melisa Vazquesz Premium : \$2.88	Long Term Disability 1234-45-678 Adjustment : \$0	
☐	North American Benefits Company Melisa Vazquesz Premium : \$2.88	Long Term Disability 1234-45-678 Adjustment : \$0	
☐	North American Benefits Company Melisa Vazquesz Premium : \$2.88	Long Term Disability 1234-45-678 Adjustment : \$0	
☐	North American Benefits Company Melisa Vazquesz Premium : \$2.88	Long Term Disability 1234-45-678 Adjustment : \$0	
☐	North American Benefits Company Melisa Vazquesz Premium : \$2.88	Long Term Disability 1234-45-678 Adjustment : \$0	

[Load more...](#)

10 / 40

Load more option finalized
from the earlier slide (3
options)

Test

Tested with 5 BPO team members, 2 Users selected same side.

Observations

Some users are trying to click or select the same side twice while matching the records.

Carrier Records (40)

Sort By

Life (5)

North American Benefits Company

Melisa Vazquesz

Premium : \$2.88

Long Term Disability

1234-45-678

Adjustment : \$0

North American Benefits Company

Melisa Vazquesz

Premium : \$2.88

Long Term Disability

1234-45-678

Adjustment : \$0

North American Benefits Company

Melisa Vazquesz

Premium : \$2.88

Long Term Disability

1234-45-678

Adjustment : \$0

North American Benefits Company

Melisa Vazquesz

Premium : \$2.88

Long Term Disability

1234-45-678

Adjustment : \$0

North American Benefits Company

Melisa Vazquesz

Premium : \$2.88

Long Term Disability

1234-45-678

Adjustment : \$0

BenAdmin Records (40)

Sort By

Life (5)

North American Benefits Company

Melisa Vazquesz

Premium : \$2.88

Long Term Disability

1234-45-678

Adjustment : \$0

North American Benefits Company

Melisa Vazquesz

Premium : \$2.88

Long Term Disability

1234-45-678

Adjustment : \$0

North American Benefits Company

Melisa Vazquesz

Premium : \$2.88

Long Term Disability

1234-45-678

Adjustment : \$0

North American Benefits Company

Melisa Vazquesz

Premium : \$2.88

Long Term Disability

1234-45-678

Adjustment : \$0

North American Benefits Company

Melisa Vazquesz

Premium : \$2.88

Long Term Disability

1234-45-678

Adjustment : \$0

North American Benefits Company

Melisa Vazquesz

Premium : \$2.88

Long Term Disability

1234-45-678

Adjustment : \$0

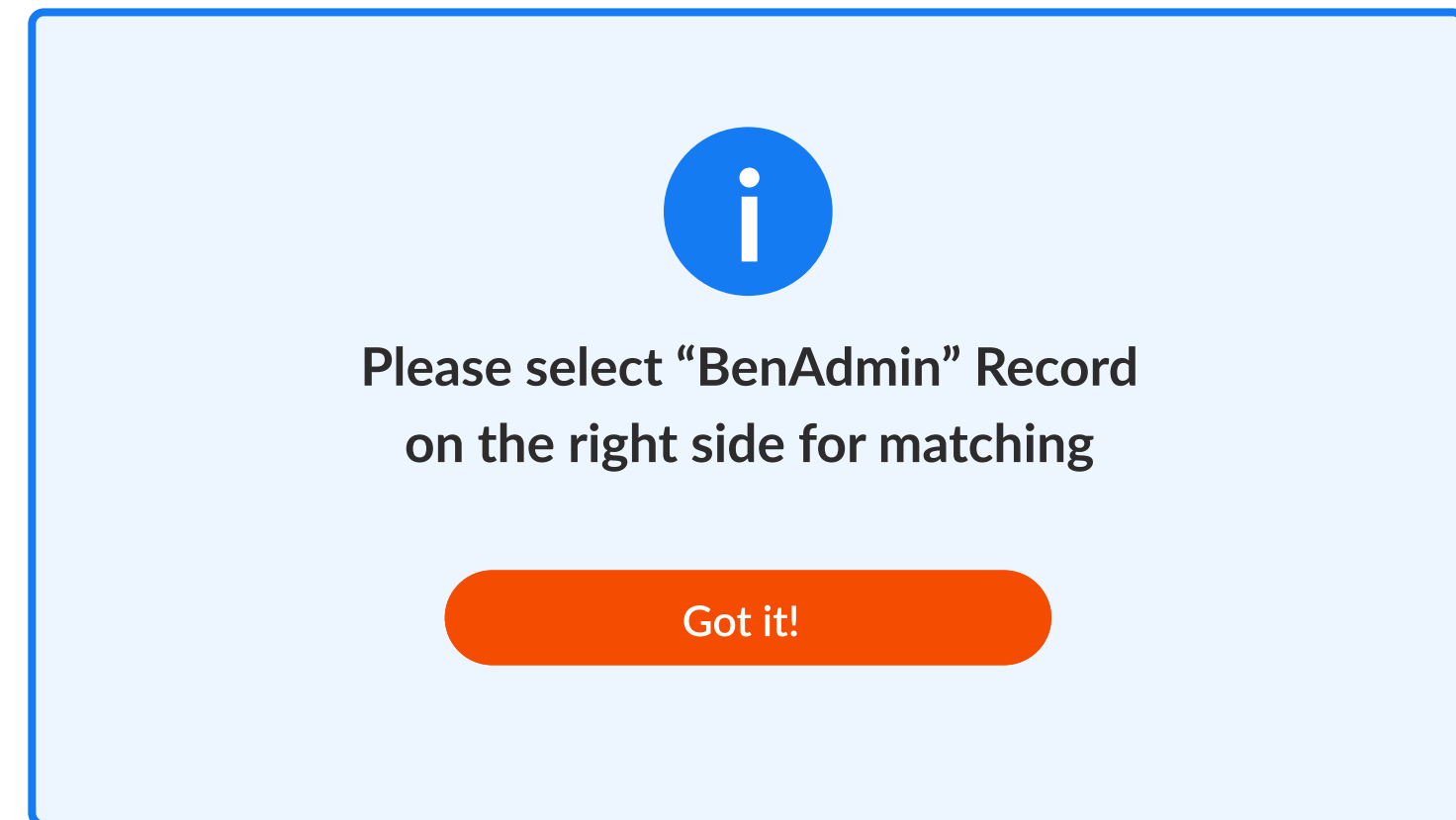
Test - Design Iteration

Design Solution

If a user clicks on the same side twice, an alert will be shown: 'Please select the BenAdmin record on the right side to match'.

Additionally, I added an information icon (visual cue) with a message below the title.

These two updates in next slide



Manual Name Mismatches

 Select Carrier record first and then you can select BenAdmin record for match.

Carrier Records (40)

Sort By ▼

Life



North American Benefits Company

Melisa Vazquez

Premium : \$2.88

Long Term Disability

1234-45-678

Adjustment : \$0

Test - After Design Iteration

Provided two solutions,
works well and guided
the user.

Adamec Cycle Sales

Import DataName Mismatch ResolutionReport Generation

Billing MonthCarrierGet Records

JulyUnited Health Care

Manual Name Mismatches

Select Carrier record first and then you can select BenAdmin record for match.

Carrier Records (40)Sort By

North American Benefits Company
+ Melisa Vazquez
Premium : \$2.88

North American Benefits Company
+ Melisa Vazquez
Premium : \$2.88

North American Benefits Company
+ Melisa Vazquez
Premium : \$2.88

North American Benefits Company
+ Melisa Vazquez
Premium : \$2.88

North American Benefits Company
+ Melisa Vazquez
Premium : \$2.88

1234-45-678
Adjustment : \$0

Long Term Disability
1234-45-678
Adjustment : \$0

Long Term Disability
1234-45-678
Adjustment : \$0

☐

☐

☐

Load more...5/40

< Back

Please select "BenAdmin" Record
on the right side for matching

Got it!

North American Benefits Company
Melisa Vazquez
Premium : \$2.88

North American Benefits Company
Melisa Vazquez
Premium : \$2.88

North American Benefits Company
Melisa Vazquez
Premium : \$2.88

North American Benefits Company
Melisa Vazquez
Premium : \$2.88

Long Term Disability
1234-45-678
Adjustment : \$0

Long Term Disability
1234-45-678
Adjustment : \$0

Long Term Disability
1234-45-678
Adjustment : \$0

☐

☐

☐

Load more...5/40

Final Designs

Adamec Cycle Sales

✔ Import Data

Name Mismatch Resolution

Report Generation

Billing Month

Carrier

July

United Health Care

Get Records

1 Accept or Reject Suggested Matches

2 Manual Name Mismatches

Accept or Reject Suggested Matches (30)

BenAdmin

CarrierPremium

Definite

Record Type	First Name	Last Name	Unique ID	Premium	Benefit	Score		
Record type 1	Kelly	Smith	123-45-678	\$400.00	Medical	Definite	☒	☐
Record type 2	Kelley	Smith	123-45-678	\$400.00	Medical		☐	☐
Record type 3	Kelly	Smith	123-45-678	\$400.00	Medical	Definite	☒	☐
Record type 4	Kelly	Smith	123-45-678	\$400.00	Medical		☐	☐
Record type 5	Kelly	Smith	123-45-678	\$400.00	Medical	Definite	☒	☐
Record type 6	Kelley	Smith	123-45-678	\$400.00	Medical		☐	☐
Record type 7	Kelly	Smith	123-45-678	\$400.00	Medical	Definite	☒	☐
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Record type 9	Kelly	Smith	123-45-678	\$400.00	Medical	Definite	☒	☐
Record type 10	Kelley	Smith	123-45-678	\$400.00	Medical		☐	☐
Record type 11	Kelly	Smith	123-45-678	\$400.00	Medical	Definite	☒	☐
Record type 12	Kelly	Smith	123-45-678	\$400.00	Medical		☐	☐
Record type 13	Kelly	Smith	123-45-678	\$400.00	Medical	Definite	☒	☐
Record type 14	Kelley	Smith	123-45-678	\$400.00	Medical		☐	☐
Record type 15	Kelly	Smith	123-45-678	\$400.00	Medical	Definite	☒	☐
Record type 16	Kelly	Smith	123-45-678	\$400.00	Medical		☐	☐

Records per page

10

< Previous

1

2

3

Next >

< Back

Save Matches >

Step 1: Search

Step 2: Potential matches

↓
Scroll down

✔ Accept or Reject Suggested Matches

2 Manual Name Mismatches

Manual Name Mismatches

Select Carrier record first and then you can select BenAdmin record for match.

Carrier Records (40)

Sort By

Life

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

Load more...

10 / 40

BenAdmin Records (40)

Sort By

Life

☐

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

☐

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

☐

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

☐

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

☐

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

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North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

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North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

☐

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

☐

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

☐

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

☐

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

Load more...

10 / 40

Manual Name Mismatches

Matches - 2

Review Selected Matches

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☒

1

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☒

2

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

+

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

☒

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

2

☐

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

☒

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

1

☐

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

☐

North American Benefits Company

Long Term Disability

1234-45-678

Premium : \$2.88

Adjustment : \$0

☐

< Back

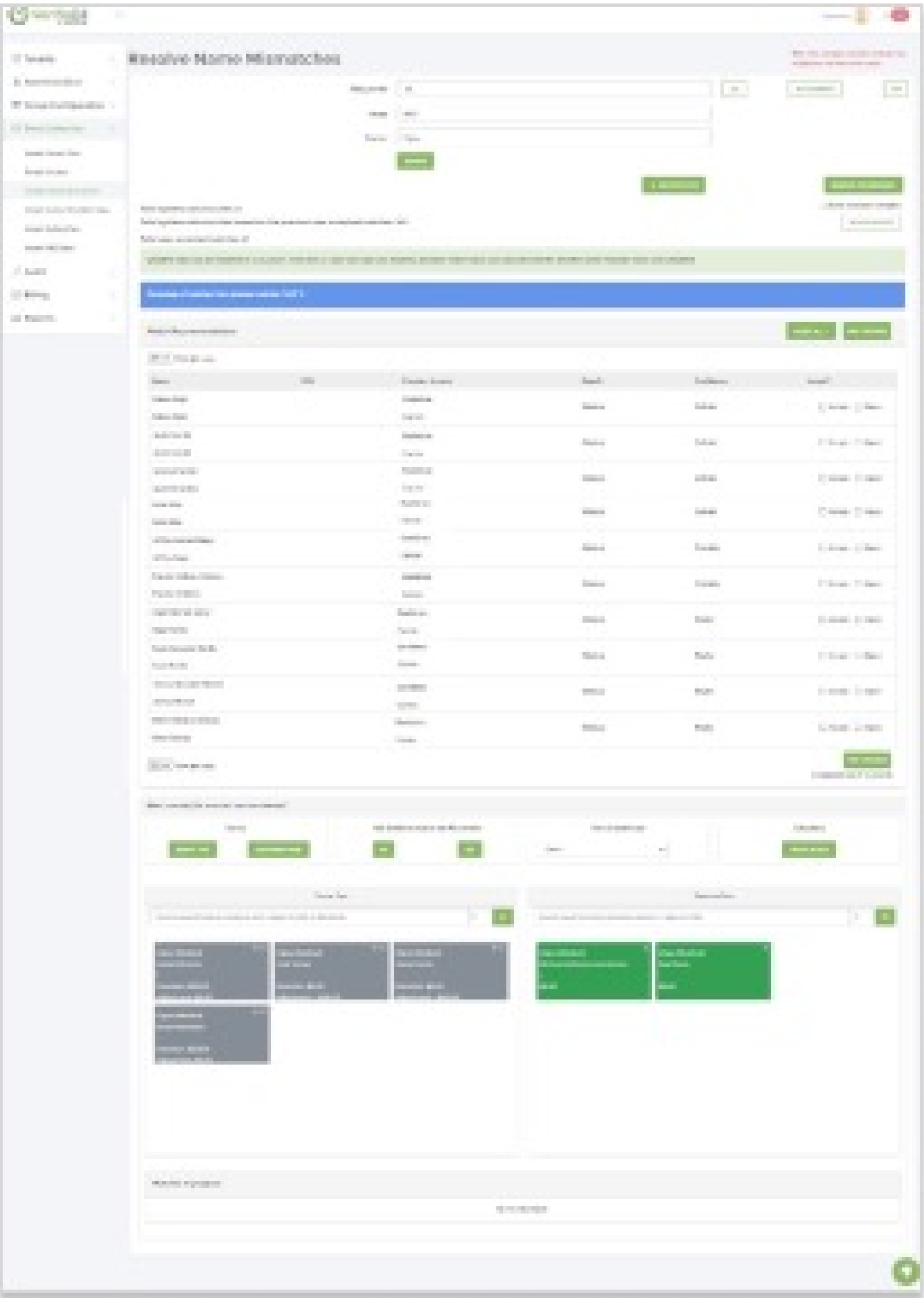
Review Selected Matches

Step 4: Review & Generate

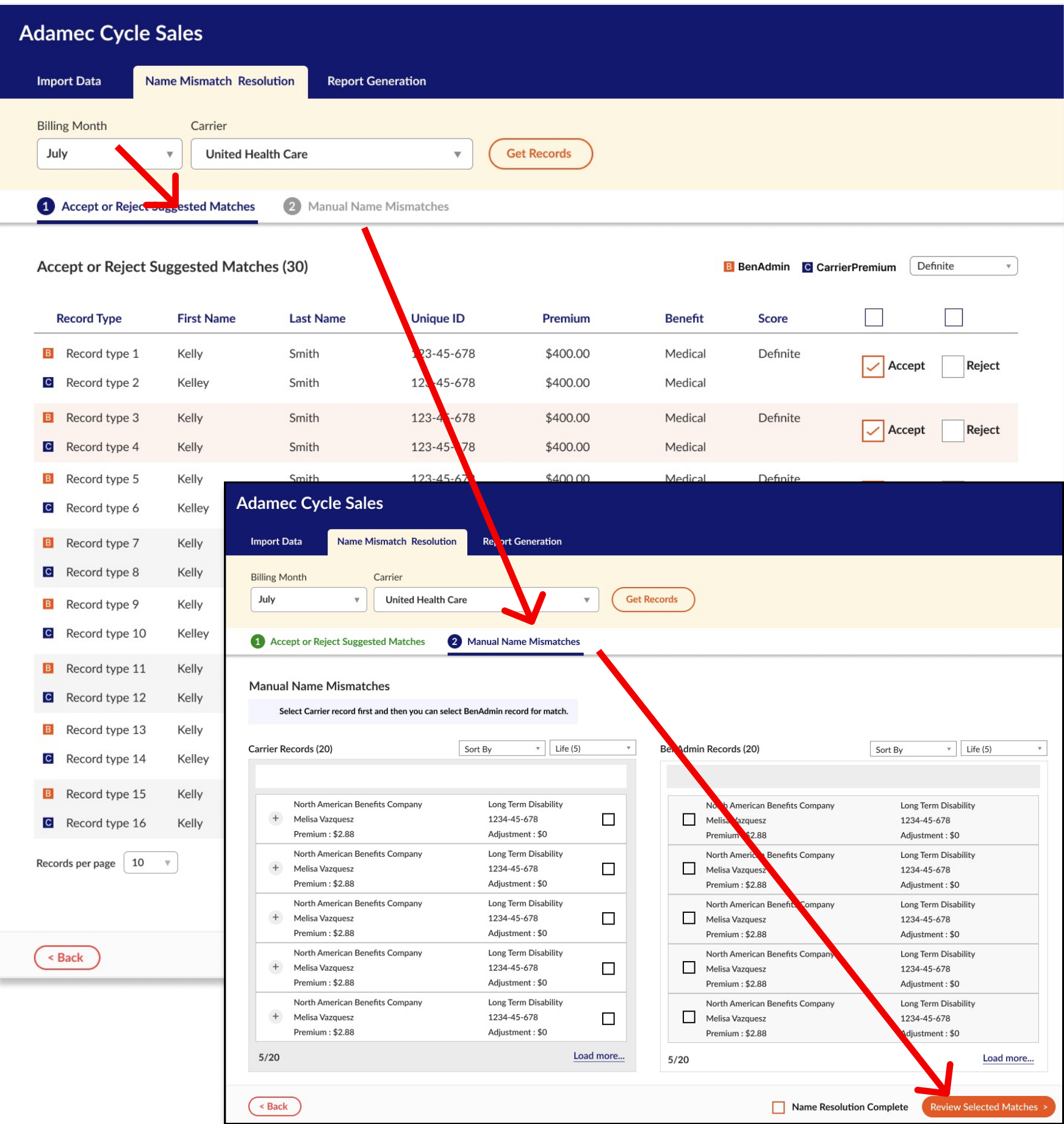
Step 3: Manual matches

Quick view

Before

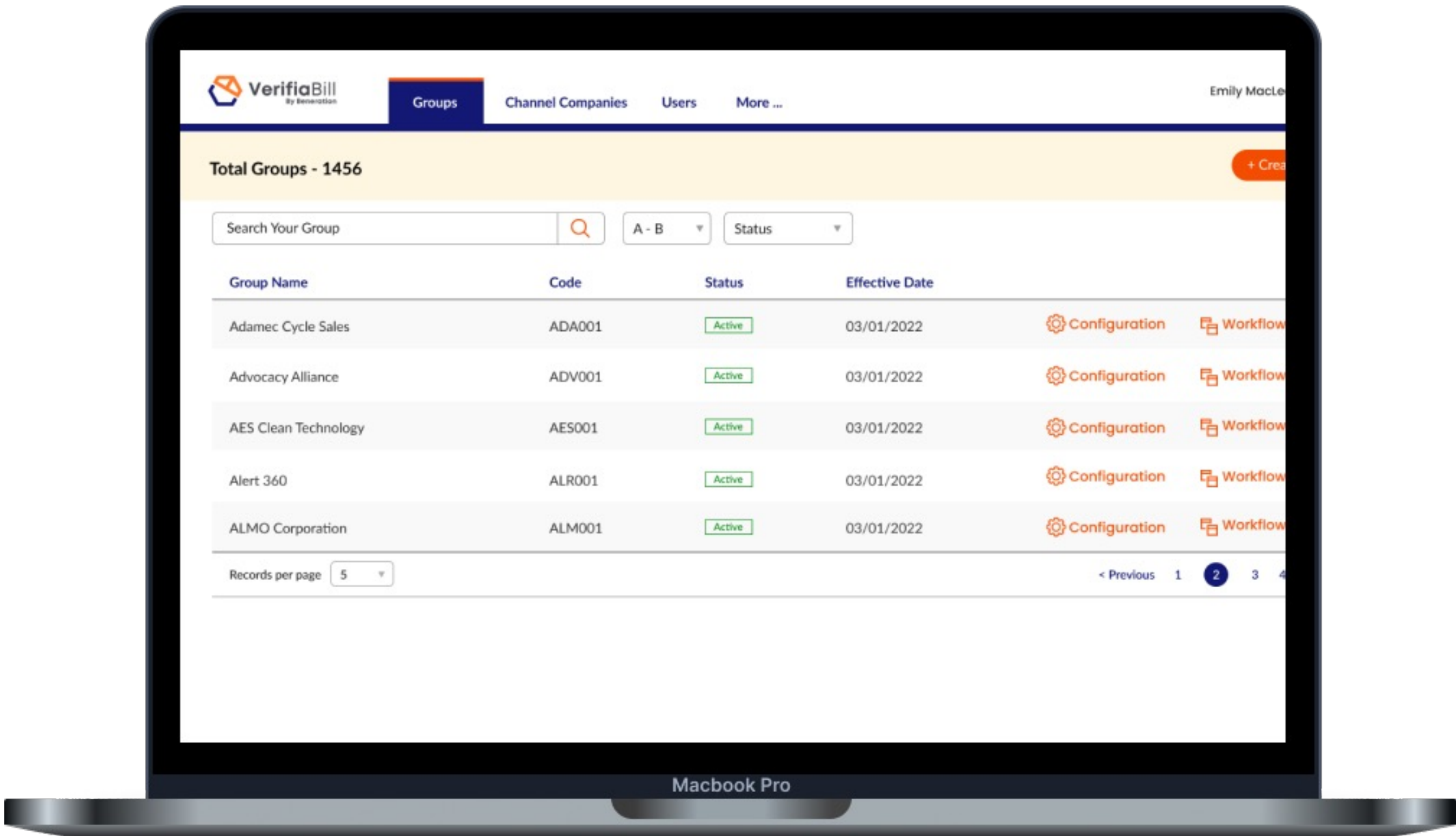


After



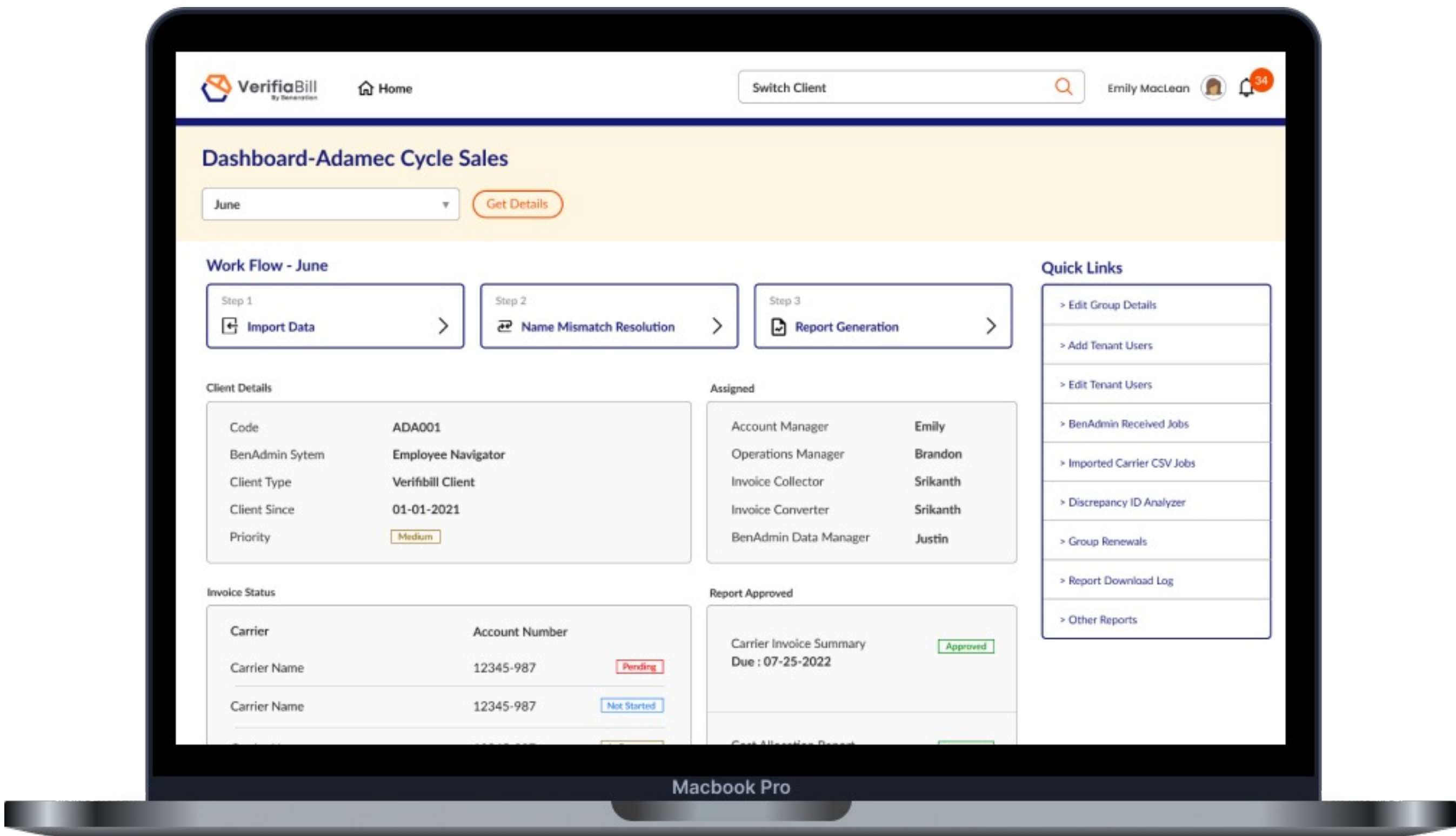
Some of the visual designs

Landing page

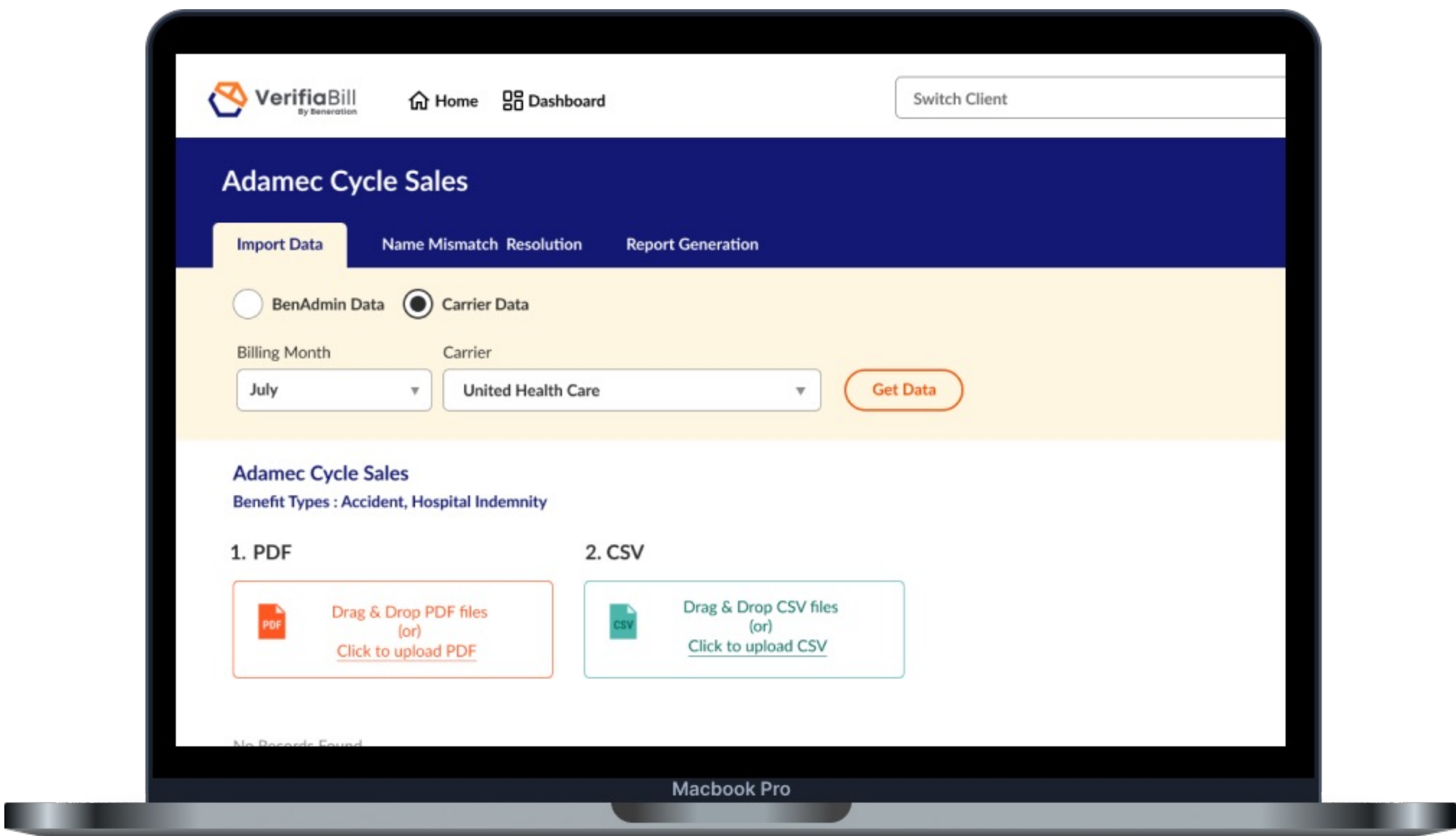


↓
Scroll down

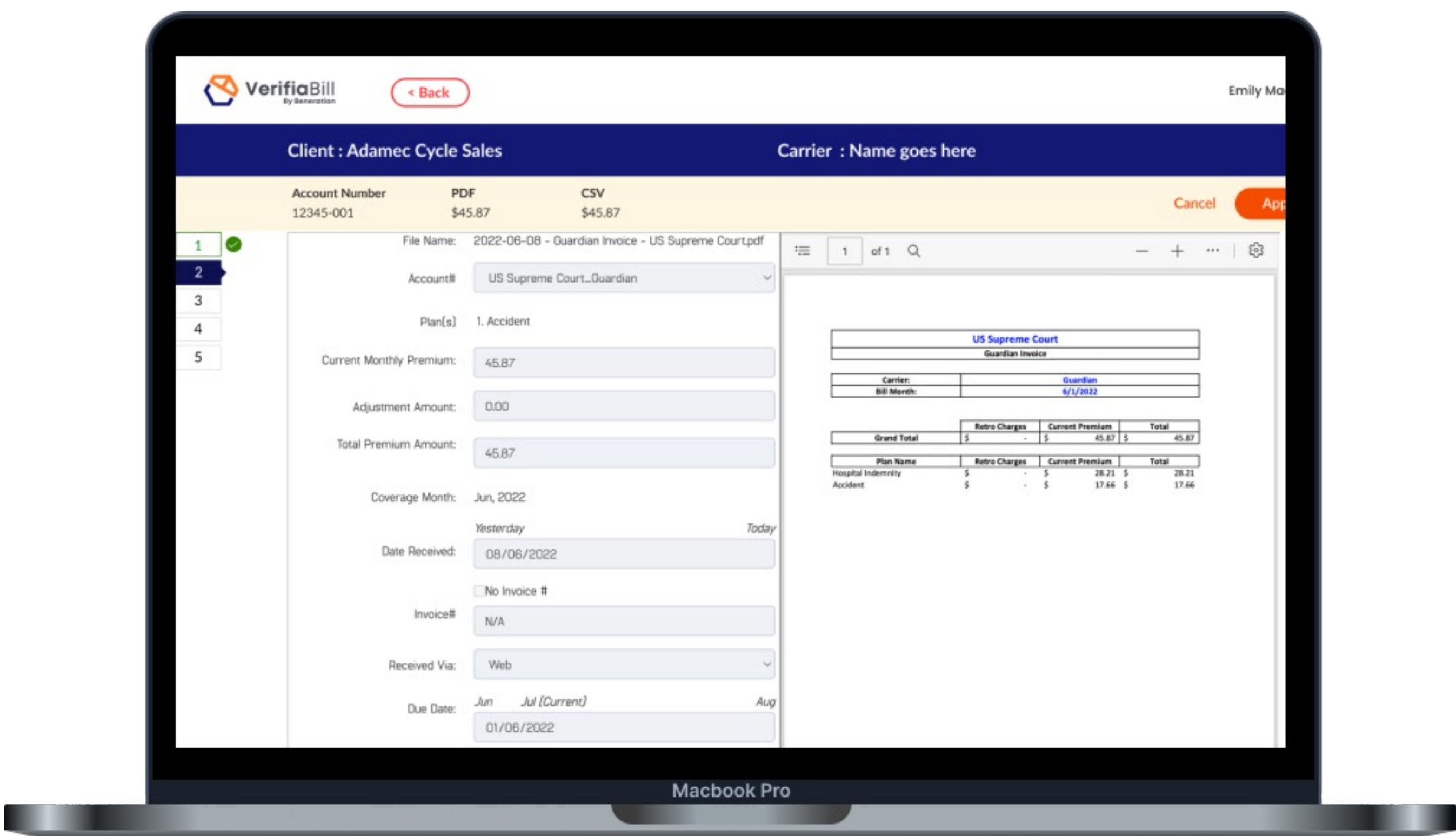
Group Dashboard



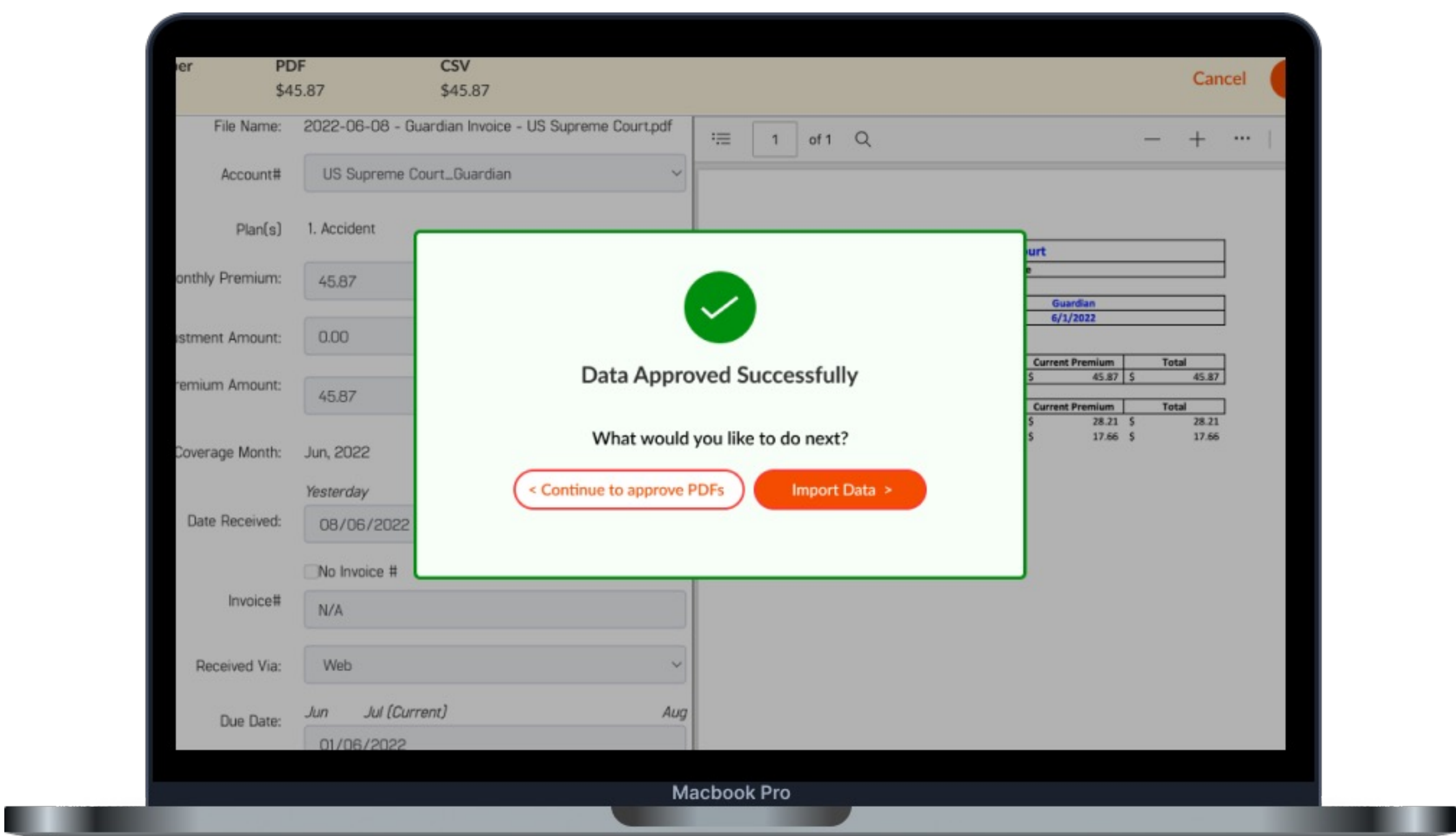
Import Data



PDF Compare



Success



Design Guidelines

Clearly defined all the visual styles, delivered to development team

Buttons Action Item Standards

Buttons & Links styles based on the context

Normal State

PRIMARY

Button

Background : #F44D01/ Rounded corners/ Whitecolor text

SECONDARY

Button

Border : #F44D01/ rounded corners/ #F44D01 text

TERTIARY

Link name

#F44D01 text

GENERAL LINKS

Click here

#F44D01 text

DISABLE

Button

Button

Click here

Background/Border : #C7C7C7

Hover State

Button

Background : #E04600

Button

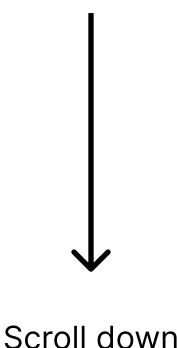
Border : #E04600

Link name

Background : #FF4F4F
Text Color : #E04600

Click here

Background : #FF4F4F
Text Color : #E04600



Scroll down

Colors

Priamry, Secondary, Text, Notifications and other color palette.

PRIMARY

#F44D01

#121874

SECONDARY

#FEF6E1

TEXT

#2C2C2C

#999999

#FFFFFF

NOTIFICATION COLORS -

#DF0000

ERROR / PENDING

#946A00

ALERT / INPROGRESS

#147BF3

INFORMATION / NOT STARTED

#008E0E

SUCCESS / COMPLETED

#2C2C2C

LABELS / GENRAL TEXT

Fonts - Typography

FOR ALL HEADINGS
Mont

H1-Heading - 24px / Bold
H2-Heading- 20px / Bold
H3-Heading - 18px / Bold

PRIMARY FONT FOR WEB / DESKTOP
Lato

BODY / INFORMATION TEXT / TOOLTIPS ETC.,
Lato / 16px / Regular & Medium / #2C2C2C

FORMS
Label Name- Lato/ 16px / Regular & Medium/#2C2C2C
Innter text - Lato/ 16px / Bold /#2C2C2C

BUTTONS
Label Name- Lato / 16px / semibold / #2C2C2C or #FFFFFF

Forms Fields Part - 1

INPUT

NORMAL

Label Name

Text goes here

Lato / 16px / Regular & Medium / #2C2C2C
Lato / 16px / Bold / #2C2C2C
border :1px solid #999999

FOCUS

Label Name

I

border :2px solid #2c2c2c

ERROR

Label Name

Text goes here

border :2px solid #DF0000
Lato / 14px / Regular / #DF0000

DISABLE

Label Name

Text goes here

Lato / 16px / Regular & Medium / #999999
Lato / 16px / Bold / #999999
Background-Color: #F3F3F3
Border :1px solid #CDCDCD

Forms Fields Part - 2

DROPDOWN

NORMAL

Label Name

Text goes here

FOCUS

Label Name

I

ERROR

Label Name

Text goes here

DISABLE

Label Name

Text goes here

TEXT AREA

NORMAL

Label Name

Text goes here

FOCUS

Label Name

I

ERROR

Label Name

Text goes here

DISABLE

Label Name

Text goes here

Forms Fields Part - 3

RADIO

NORMAL

Label Name

Selected

Label Name

ERROR

Label Name

DISABLE

Label Name

CHECKBOX

NORMAL

Label Name

Selected

Label Name

ERROR

Label Name

DISABLE

Label Name

Forms Fields Part - 4

OTHERS

HELPING TEXT

Label Name

Helping text goes here

Lato / 14px / Medium / #707070

\$, % ETC., STYLES

Amount

\$

Percentage

%

Lato / 16px / Bold / #707070

INFORMATION ICON - TOOL TIP

Label Name

A shorter version of the group name that will be displayed on reports & communications with the group

Lato / 14px / Regular / #2C2C2C
Background-color: #FEF6E1
Border : 1px solid #999999

Icon i will provide to the developer.

Tabs

Groups

Channel Companies

Users

Groups

Channel Companies

Users

Groups

Channel Companies

Users

Default stage

Step 1

Import Data

Step 2

Name Mismatch Resolution

Step 3

Report Generation

Inprogress stage

Step 1

Import Data

Step 2

Name Mismatch Resolution

Step 3

Report Generation

All steps completed stage

Step 1

Import Data

Step 2

Name Mismatch Resolution

Step 3

Report Generation

Title goes here

Tab 1

Tab 2

Tab 3

Title goes here

Tab 1

Tab 2

Tab 3

Title goes here

Tab 1

Tab 2

Tab 3

1 Accept or Reject Suggested Matches 2 Manual Name Mismatches

One step completed stage

1 Accept or Reject Suggested Matches 2 Manual Name Mismatches

Table

Standards

- Search
- Sorting
- Filter options on the top
- Pagination & Records per page

- Table header
- Differentiate Row1 & Row2 with background color
- Each row, when user mouse hover add different background color
- Action items should be differetniate with Orange color (Links & icons)

Header 1

Header 2

Row1: Background : #999999

Row2: Background : #FFFFFF

Row3: Mouse Hover Background : #FEF6E1

Records per page

Previous 1 2 3 4 5 Next

font-size : Lato / 16px / bold / #121874

font-size : Lato / 16px / Regular or Medium / #F44D01

font-size : Lato / 14px / bold / #121874

font-size : Lato / 14px / bold / #121874

Takeaways

Impact

- 60% Reduced time
- 80% increased efficiency
- 100% Satisfaction from the users.

Learnings

- Importance of UCD.
- Don't jump into design first,
You are not the user.



Scroll down

Client says -

Linkedin comments



Kelly R Smith - Senior Product Manager at Beneration

I've worked with Chandu on several occasions, most recently as we are redesigning our entire application. Chandu has been a pleasure to work with, and is meticulous in gathering feedback & information and providing creative design solutions. He is user focused and has a knack for identifying areas of opportunity design wise (in places where me or other internal users may miss). He has been instrumental in the future of our application & making our users happy, and would highly recommend his work to anyone.



Ray Crozier - Product Owner at Beneration

I've had the pleasure of working closely with Chandu on various projects, most notably our recent application redesign. Chandu is an exceptional UI/UX designer who stands out for his meticulous approach to gathering feedback, his knack for delivering innovative design solutions, and his unwavering focus on user satisfaction. His contributions have been instrumental in shaping the future of our application and ensuring user happiness. I wholeheartedly recommend Chandu to anyone seeking a highly skilled UI/UX designer who consistently exceeds expectations.



Thank you for your
patience in reviewing
this case study.

-Chandu Majeti